

**Tech, Remote Work and More:  
What Estate Planners Need to  
Know Now**

Handout materials are available for download or printing on the **HANDOUT TAB** on the gotowebrinar console. If the tab is not open click on that tab to open it and view the materials.

**PEAK TRUST COMPANY**  
Financial Trust & Wealth Management Solutions

**InterActive Legal**

**A KEY ESTATE PLANNING GUIDE**

[ChronicleLawPlanning.org](http://ChronicleLawPlanning.org)

1

---

---

---

---

---

---

---

---

---

---

1

**Tech, Remote Work and More:  
What Estate Planners Need to  
Know Now**

By: Barron K. Henley, Esq., Partner, Affinity Consulting Group, Mary E. Vandenaek, Esq., Jonathan G. Blattmachr and Martin M. Sherkmnan, Esq.

**PEAK TRUST COMPANY**  
Financial Trust & Wealth Management Solutions

**InterActive Legal**

**A KEY ESTATE PLANNING GUIDE**

**Law Easy**

2

---

---

---

---

---

---

---

---

---

---

2

**General Disclaimer**

- The information and/or the materials provided as part of this program are intended and provided solely for informational and educational purposes. None of the information and/or materials provided as part of this power point or ancillary materials are intended to be, nor should they be construed to be the basis of any investment, legal, tax or other professional advice. Under no circumstances should the audio, power point or other materials be considered to be, or used as independent legal, tax, investment or other professional advice. The discussions are general in nature and not person specific. Laws vary by state and are subject to constant change. Economic developments could dramatically alter the illustrations or recommendations offered in the program or materials.

3

---

---

---

---

---

---

---

---




---

---

3

**Thank you to our sponsors**

- InterActive Legal
  - Vanessa Kanaga
  - (321) 252-0100
  - [sales@interactivelegal.com](mailto:sales@interactivelegal.com)

4

---

---

---

---

---

---

---

---

4

**Thank you to our sponsors**

- Peak Trust Company
  - Nichole King
  - Phone: 702.462.6677
  - Toll Free: 844.391.2789
  - [NKing@peaktrust.com](mailto:NKing@peaktrust.com)




5

---

---

---

---


---

---

---

---

5



Jane Ransom, Executive Director  
[ransom@americanbrainfoundation.org](mailto:ransom@americanbrainfoundation.org)  
 AmericanBrainFoundation.org

6

---

---

---

---

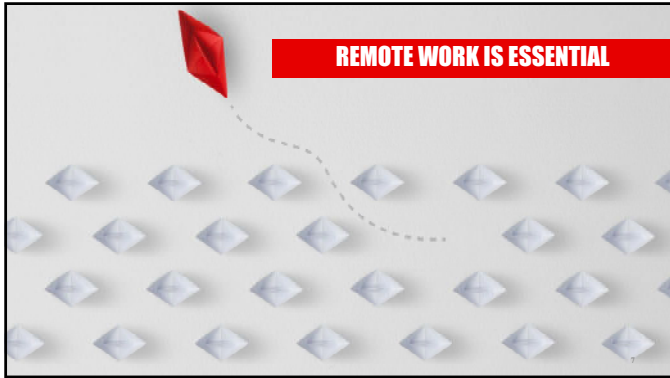
---

---

---

---

6



7

---

---

---

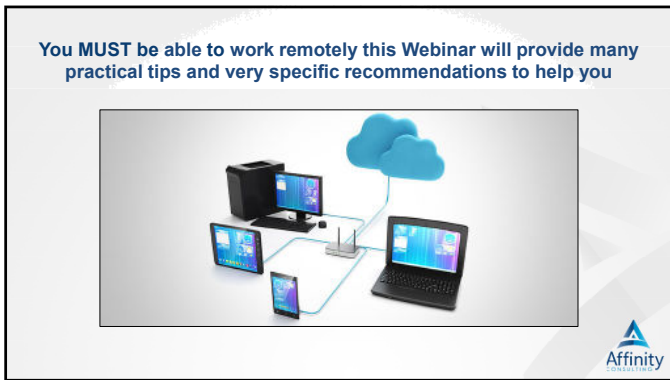
---

---

---

---

---



8

---

---

---

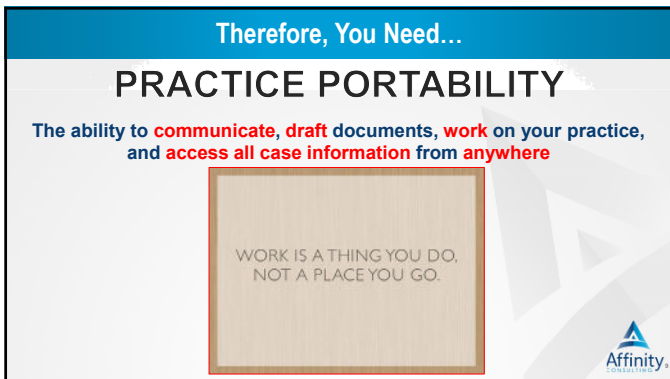
---

---

---

---

---



9

---

---

---

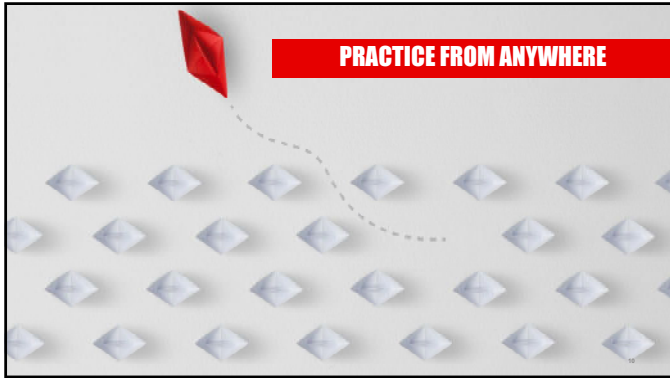
---

---

---

---

---



10

---

---

---

---

---




---

---

---

**Untethered Practice**

Is it possible for you to work with **maximum efficiency when you're not at the office**? This webinar will give you lots of specific suggestions on software, hardware and practices to help you be efficient in working remotely

11

---

---

---

---

---




---

---

---

**Untethered Practice**

It is possible to have **lawyers or staff persons** work for your firm who **aren't physically present**. Some were prepared, many were forced by COVID-19 into remote work. Regardless, we'll give you tips to make it easier and more efficient.

12

---

---

---

---

---

---

---

---

**Trend Toward Untethered Practice**


Technological advances have created the ability to run a full-service law firm **without a physical office**.

The potential of a business disaster makes it a **required capability**.

Used to be a **want**, now it's a **need**.

We'll tell you what to buy and Do **NOW** to function better in the COVID remote environment

Mary/Marty will share what they have in their home offices which might be useful for attendees to consider for their offices. You can order anything online you need and have it delivered.



13

---

---

---

---

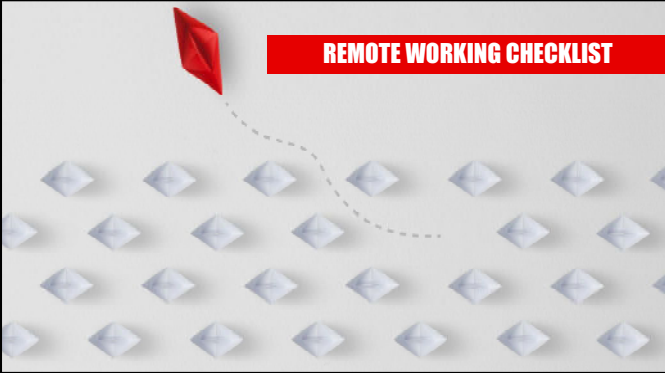
---

---

---

---

**REMOTE WORKING CHECKLIST**



14

---

---

---

---

---


---

---

---

**Remote Work Checklist**

- ▶ Internet access – **Mary - issues with remote areas; Marty bandwidth issues**
- ▶ Mobile hardware
- ▶ Other required hardware to work remotely **Mary uses 3 screens; Marty uses 1 laptop**
- ▶ Mobile communications
- ▶ Electronic filing system and remote access to the files – not reliant upon paper files
- ▶ Billing & accounting with remote access
- ▶ Centralized, sharable client database - case management system
- ▶ Get documents signed remotely
- ▶ Security and protecting client data when working remotely
- ▶ Home workspace - **Separate office vs. armchair**
- ▶ New processes and procedures



15

---

---

---

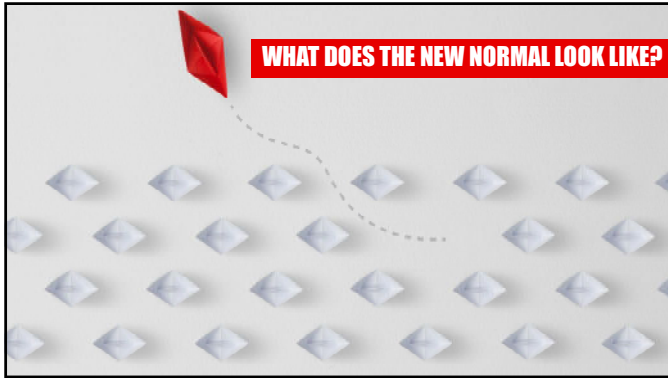
---

---

---

---

---



16

---

---

---

---

---

---

---


---

**A Couple of Predictions**

- ▶ **Practice portability won't be a luxury, it will be a requirement – many firms are still mired in old style admin/secretaries, etc.**
- ▶ **Internet reliance will grow – so it makes sense to have a backup**
- ▶ **Law offices will have a more geographically diverse workforce**
- ▶ **Web meetings instead of in-person meetings – It's more efficient**
- ▶ **Lawyers less familiar with technology must learn it NOW!**

**Maintaining Competence**

88. To maintain the requisite knowledge and skill of a lawyer should, keeping abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.



17

---

---

---

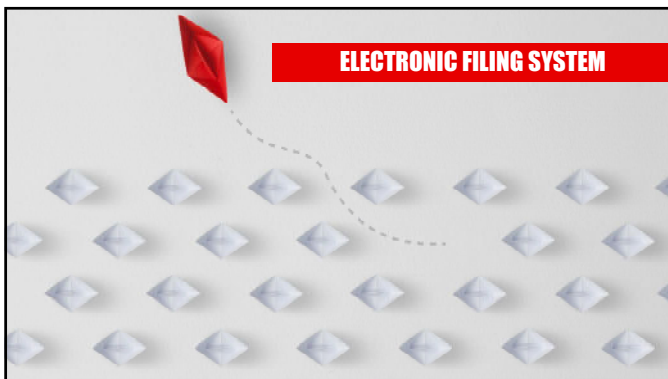
---

---

---

---

---



18

---

---

---

---

---

---

---


---

### What's Realistic?

**Eliminate all paper?**  
Probably not

**Reduce paper?**  
Absolutely

**But what do you do NOW??**



19

---

---

---

---

---

---

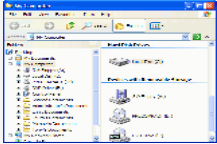

---

---

### Solution

▶ It's fine to maintain some paper files BUT in a COVID-19 environment (and when will it end? What if there is a resurgence and future closures?) how to do you get any paper files? **Marty story of colleague – progression ... temp Redweld; Mary on going paperless**

▶ **But your electronic files have to be complete**

20

---

---

---

---

---

---

---

---

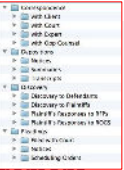
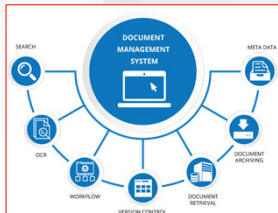
### Two Basic Methods You Can Use

**1. Plain folders + search utility**

or

**2. Document management system (DMS)**

**3. You can use both on an integrated basis**

21

---

---

---

---

---


---

---


---

### Paper Reduction Roadmap – More Long Term

1. Backup systems & security (everyone has confidence in)
2. Hardware
  - A. Desktop Scanners
  - B. Dual monitors that rotate
  - C. Tablets/ultrabooks/laptops
3. Searchable PDFs
4. Search Program or Document Management System ("DMS")
5. If No DMS
  - A. One folder per matter
  - B. Consistent file naming convention
6. Digitize all incoming documents
7. Email must be stored outside your email program – **e.g. world docs can pop up template you must fill in to save into system**







22

---

---

---

---

---

---

---

---

### Paper Reduction Roadmap – What do you do NOW?

Backup systems & security (everyone has confidence in)  
 An IT Consultant may be able to add additional systems now

Hardware – your office may not be changed today but you can buy equipment for your home use NOW

- A. Desktop Scanners – perhaps smaller home models
- B. Dual monitors that rotate
- C. Tablets/ultrabooks/laptops

Searchable PDFs – you can add software now

If No DMS

- A. One folder per matter
- B. Consistent file naming convention **Mary to comment**




Digitize all incoming documents – professionals working remotely should be **can you**


**Reduce mail volume e.g. use instructions for digital return of documents; Clients are OK doing this!**

Required to scan or save electronically any documents currently worked on even if your Firm is not paperless

Email must be stored outside your email program

Collaborative Technology – essential in a COVID world



23

---

---

---

---

---

---

---

---

## STEP 1:

# Bullet-Proof Backup & Security

24

---

---

---

---

---


---

---

---

**Backup & Security**

- ▶ **Redundancy critical**
- ▶ **Backup rules**
  - ▶ No excuses
  - ▶ Unattended is best
  - ▶ Backup everything
  - ▶ Check the backup log
  - ▶ Off-site storage
  - ▶ No incremental backups
  - ▶ Run test restores
  - ▶ Have secondary method



25

---

---

---

---

---

---

---

---

**Backup on a Budget (What You Can add NOW!)**

- ▶ **Carbonite Personal Plus**  \$72/PC/yr – unlimited storage
- ▶ **WD 3TB My Book Desktop External Hard Drive** - \$89 
- ▶ **Acronis True Image 2020** - \$35 – creates a mirror image of entire hard drive 



26

---

---

---

---

---

---

---

---

**STEP 2: The Hardware**



27

---

---

---

---

---



---

---

---

### Scanners

- ▶ You may need a copier, but...
- ▶ All success stories used distributed scanning in the current environment partners and other staff should be provided with home scanners if they have any paper that they handle
- ▶ Some professionals still want to print and mark up a document or plan manually and they need to scan it **Try marking up in word; use a table of contents to create the structure documents**
- ▶ An all in one printer/scanner/copier may be best – see later

28

---

---

---

---

---

---


---

---

### Scanners

**Key features for desktop scanners**

- ▶ We prefer sheet fed v flat bed
- ▶ Document feeder
- ▶ Quiet
- ▶ USB connection
- ▶ Black & white or color, legal or letter & fast



29

---

---

---

---

---

---

---

---

### Recommended Flatbed Scanners

- ▶ **Xerox Duplex Combo Flatbed Scanner**  
(25/50 ppm – \$224)
- ▶ **Fujitsu fi-7280** (80/160 ppm – \$1,835)






30

---

---

---

---

---

---

---

---

### Recommended Sheetfed Scanners

- ▶ **Fujitsu ScanSnap iX1500**  
(30/60 ppm – \$420)
- ▶ **Brother ImageCenter ADS-2800W**  
(40/80 ppm – \$400)
- ▶ **Canon DR-C225W II** (25/50 ppm – \$412)



31

---

---

---

---

---

---

---

---

### Recommended Sheetfed Scanners

- ▶ **Fujitsu fi-7160** (60/120 ppm – \$831)
- ▶ **Fujitsu fi-7180** (80/160 ppm – \$1,469)
- ▶ **Fujitsu fi-7300NX** (network scanner  
60/120 ppm – \$1,070)



32

---

---

---

---

---




---

---

---

### Recommended Portable Scanners (for those with more limited home office space)

- ▶ **Fujitsu ScanSnap S1300i**  
(8/16 ppm - \$248)
- ▶ **Fujitsu ScanSnap iX100**  
(really slow - \$190)



33

---

---

---

---

---

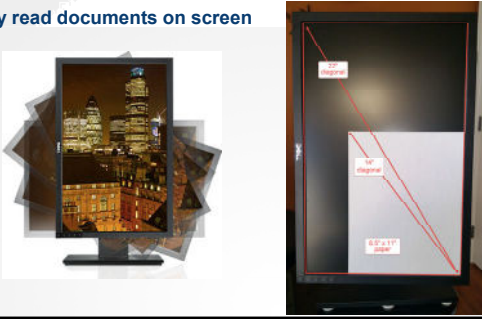
---

---

---

### Buy Monitors That Rotate

Easily read documents on screen



The first image shows a monitor displaying a cityscape at night. The second image shows a monitor displaying a document with red lines indicating readability. The Affinity logo is in the bottom right corner.

34

---

---

---

---

---

---

---

---

### If Current Monitors Don't Rotate, Get a VESA Stand

Do a web search for **VESA monitor stand**



The first image shows a stand with two monitors. The second image shows a stand with one monitor. The third image shows a stand with one monitor and a circular inset showing a close-up of the VESA mount. The Affinity logo is in the bottom right corner.

35

---

---

---

---

---


---

---

---

### Dual Monitors Highly Recommended

\$1,000 + for a single 49" monitor ~~x~~  
\$280 - \$300 for dual 27" monitors ~~x~~



The image shows a curved monitor displaying a sunset scene. The Affinity logo is in the bottom right corner.

36

---

---

---

---

---


---

---

---

### Mobile Computer or Tablet

- ▶ You definitely need a **laptop or tablet** as your primary computer
- ▶ More on this later



37

---

---

---

---

---

---

---

---



STEP 3:

Searchable  
PDFs

38

---

---

---

---

---


---

---

---

### Scanning Software

- ▶ Digital documents must be **PDFs**
- ▶ **Portable Document Format** is a file format that captures all elements of a printed document as an electronic image that you can view, navigate, print, or forward to someone else
- ▶ You can buy and download the software to your laptop while working remotely if you do not already have it



39

---

---

---

---

---

---

---

---

**Types of PDFs**


**Image only PDFs x**

- ▶ Just an image of original
- ▶ Cannot be searched for words contained inside
- ▶ Default type of PDF from scanners

**Searchable PDFs (what you want) x**

- ▶ Layer of searchable text behind image
- ▶ Searchable
- ▶ Indispensable

**If you don't have searchable PDFs, you will have difficulty finding them in the future**



40

---

---

---

---

---

---

---

---

**If You Have Thousands of PDFs To OCR**

- ▶ DocsCorp contentCrawler
- ▶ Trumpet Symphony OCR




41

---

---

---

---

---


---

---

---

**STEP 4:**

**Search Program  
or  
Document Management System**



42

---

---

---

---

---



---


---

---

### Windows Search Software

- ▶ **Copernic Desktop Search Professional** - \$56/yr x
- ▶ **X1 Search** - \$67/yr
- ▶ **dtSearch** - \$199
- ▶ **Windows Vista/7/8/10 Instant Search**
- ▶ **Filehand**



43

---

---

---

---

---

---

---

---

---

---

### Mac Search Software

- ▶ **Spotlight Search (Mac OSX)**
- ▶ **EasyFind: Free**
- ▶ **HoudahSpot: \$30**





44

---

---

---

---

---

---

---

---

---

---

### Players

- ▶ **Worldox GX**
- ▶ **iManage WorkSite**
- ▶ **NetDocuments**
- ▶ **OpenText**
- ▶ **LaserFiche**









45

---

---

---

---

---

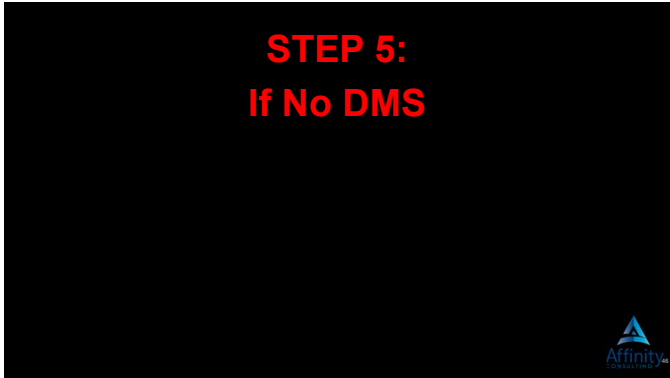
---

---

---

---

---



46

---

---

---

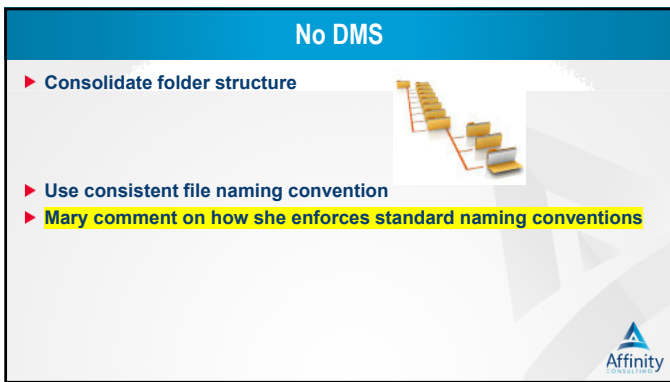
---

---

---

---

---



47

---

---

---

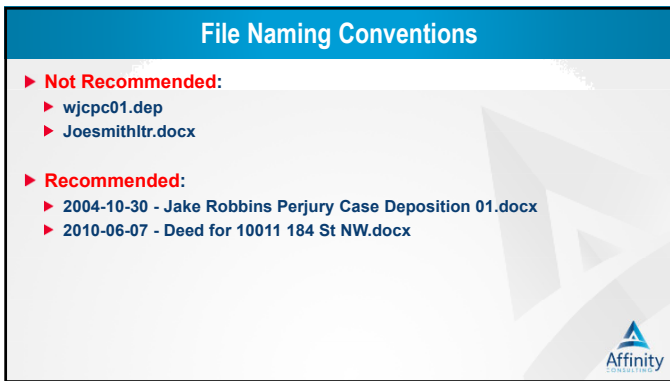
---

---

---

---

---



48

---

---

---

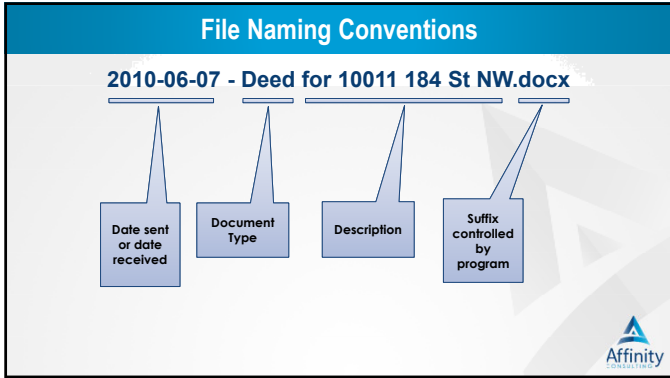
---

---

---

---

---




---

---

---

---

---

---

---

---

49




---

---

---

---

---

---

---

---

50

### Electronic Filing System

**Must hold:**

- ▶ Documents created internally
- ▶ Documents received
- ▶ Email
- ▶ Email attachments
- ▶ Faxes
- ▶ Notes
- ▶ You **CAN** start now! You should!

---

---

---

---

---

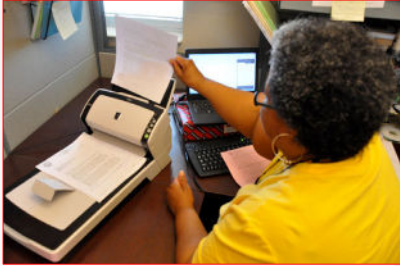
---

---

---

51

Make your **active file digital**  
(don't wait until COVID is over to start scanning)



52

---

---

---

---

---

---

---

---

### Digitize Mail & Faxes

- ▶ If you have a physical fax machine in your office convert NOW to an internet fax service. This CAN be done remotely in the current environment
- ▶ Consider Internet fax service
  - ▶ [www.ringcentral.com](http://www.ringcentral.com)
  - ▶ [www.myfax.com](http://www.myfax.com)
  - ▶ [www.efax.com](http://www.efax.com)
  - ▶ [www.greenfax.com](http://www.greenfax.com)
  - ▶ [www.onebox.com](http://www.onebox.com)
  - ▶ [www.faxzero.com](http://www.faxzero.com)
- ▶ Don't scan *everything*
- ▶ Distribute mail and let users scan



53

---

---

---

---

---

---

---

---

### STEP 7: Email Stored Outside Email Program



How to save an email to PDF

54

---

---

---

---

---


---

---


---

**Store Email Outside of Email App**

- ▶ **STOP PRINTING email**



- ▶ Save as **MSG** or **PDF** files – or store them in a document management system
- ▶ Professionals accustomed to having staff print emails should **IMMEDIATELY** change to saving PDFs of important emails while forced to work remotely during COVID



55

---

---

---


---

---


---

---

---

- ▶ If you use  **Outlook**

- ▶ Then you need one of these **because they integrate**
  - ▶ Adobe Acrobat
  - ▶ Nuance Power PDF Advanced
  - ▶ Foxit PhantomPDF Business
  - ▶ Nitro Pro



56

---

---

---

---


---

---

---

---

**STEP 8:**  
**Collaborative Tools**



57

---

---

---

---

---

---

---

---



58

---

---

---

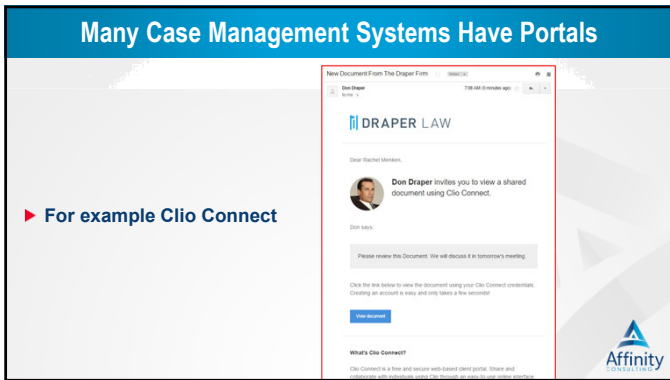
---

---

---

---

---



59

---

---

---

---

---

---

---

---



60

---

---

---

---

---


---

---

---

**Training**

- ▶ Include all staff – even those who don't think they'll scan (they'll change their minds) – This can be done remotely now with a zoom meeting
- ▶ **Training on remote work management**
- ▶ Most important step
- ▶ Breaks down resistance
- ▶ Use the current COVID tragedy to push reluctant professionals to adapt to essential technology as they may have no choice but to do so in the current environment



61

---

---

---

---

---


---

---

---

**Develop Protocols**

- ▶ Write down how you do it – create a **“Cheat Sheet”** for each step with screen shots to make it really EASY for a non-techie to do it
- ▶ **Marty and Mary will comment**
- ▶ Should be part of your employee manual



62

---

---

---

---

---


---

---

---

Now that you have an **electronic filing system,**

**RELY ON IT!**



63

---

---

---

---

---


---

---

---

### Incredibly Inexpensive Storage

- ▶ 1 page of a PDF document = roughly 30 kilobytes
- ▶ 1 gigabyte = 1,073,741,824 bytes or 35,791 pages of text
- ▶ 1 bankers box holds about 2,500 pages
- ▶ 1 gigabyte can store 14.3 banker's boxes of documents (so let's round down to 14)
- ▶ 3 TB USB external hard drive = \$90
- ▶ Therefore, a single drive could hold 42,000 bankers boxes of documents at a cost of \$0.0021 per box.



64

---

---

---

---

---


---

---

---

### Problems Solved

- ▶ Remote access – especially now during COVID stay at home orders
- ▶ Electronic files always in the same place
- ▶ Lower operating costs
- ▶ Electronic files are easily searchable
- ▶ Easy to share & collaborate
- ▶ Easily transportable
- ▶ Instant data access
- ▶ Easy updating
- ▶ No storage costs.



65

---

---

---

---

---

---

---

---

### ACCESSING FILES REMOTELY



66

---

---

---

---

---

---

---

---

**3 Basic Approaches – Use 1, 2 or all 3 Depending on your Current Status**

- ▶ Sync files to laptop   
- ▶ Cloud sharing or access   
- ▶ Connect to office server or PC  

67

---

---

---

---

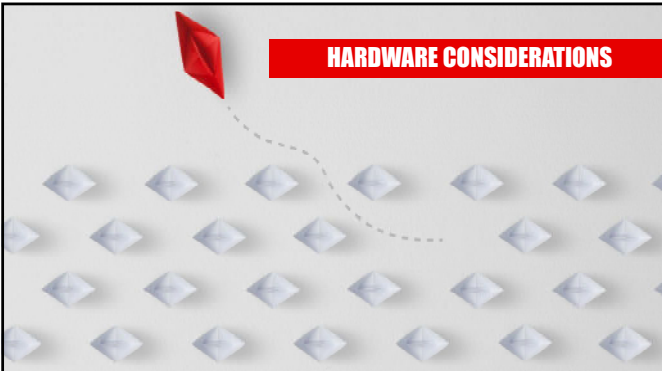
---

---

---

---

**HARDWARE CONSIDERATIONS**



68

---

---

---

---


---

---

---

---

**Two Basic Options**

- ▶ PC you can take with you 
- ▶ Home PC used to remotely access office systems  
(these must be secure from family members)



69

---

---

---

---

---

---

---

---

### You Want An Ultrabook Configuration

- ▶ Resume from hibernation < 3 seconds
- ▶ Battery life > 6 hours of video
- ▶ USB 3.0, USB-C or Thunderbolt ports
- ▶ < 0.83" thick
- ▶ < 3 lbs.
- ▶ Powerful
- ▶ Touch
- ▶ Antivirus
- ▶ Anti-theft
- ▶ Hardware security

For example:  
Dell XPS 13 in Frost White



70

---

---

---

---

---

---

---

---

### 2-in-1 Convertible

Hybrid tablet/laptop



71

---

---

---

---



---

---

---

---

### Tablet



72

---

---

---

---

---

---

---

---

Unless you're doing pretty basic stuff, an iPad probably won't cut it



However, the tradeoff between a 2-in-1 PC and a tablet is negligible



73

---

---

---

---

---



---

---

---

### Laptop + Dock + Monitors + Keyboard/Mouse

- ▶ One laptop and docking station at home and office.
- ▶ Docking station is less costly than redundancy of multiple computers.
- ▶ Multiple computers gives you redundancy.



74

---

---

---

---

---


---

---

---

### You Can't Assume Everyone Has A Home PC

- ▶ If everyone in your office has a desktop, they may not be able to work at home
- ▶ This is not very portable!
- ▶ Might be time to consider **laptops for everyone**
- ▶ You can order online and have shipped directly to the homes of professionals and staff who need them NOW. You can have an IT consulting help remotely set up whatever is needed.



75

---

---

---

---

---


---

---

---

### Laptop Configuration Recommendation

- ▶ 13.3", 14" or 15.6" touch screen – smaller = lighter laptop
- ▶ 16 GB of RAM (32 OK, 8 not OK)
- ▶ 500 GB or 1,000 GB (1 TB) solid state hard drive
- ▶ Biometric/fingerprint reader built in
- ▶ Windows 10 Pro (not Home) or Mac OSX
- ▶ 3 year, next business day, on-site warranty + accidental damage protection
- ▶ Intel i5 or i7 processor – 8<sup>th</sup>, 9<sup>th</sup>, or 10<sup>th</sup> gen



76

---

---

---

---

---


---

---

---

### Deciphering Intel Processors

- ▶ i3 – i5 – i7 – i9: speed/power increments
- ▶ **Generation: current is 10<sup>th</sup> – how to tell**
  - ▶ Intel Core i7-10710U – 10<sup>th</sup> gen
  - ▶ Intel Core i7-9750H – 9<sup>th</sup> gen
- ▶ **Power Consumption:**
  - ▶ Intel Core i7-9750H – High performance graphics, uses more juice
  - ▶ Intel Core i7-10710U – Ultra low power consumption (most are here)
  - ▶ Intel Core i7-10310Y – Extremely low power consumption (uncommon)
- ▶ For a full explanation, see <https://intel.ly/2JgoHoQ>



77

---

---

---

---

---

---

---

---

### Keyboard/Mouse Combo for Dock

External keyboard/mouse combo MK550 or MK710




1. Customizable keys
2. Comfort wave keyframe
3. Cushioned palm rest

4. Extended life battery\*
5. Ambidextrous laser mouse
6. USB Receiver included

\*May vary based on use and operating conditions.



78

---

---

---

---

---

---

---

---

### Best Travel Mice

- ▶ Logitech MX Master - \$60
- ▶ Logitech Anywhere Mouse MX - \$35



79

---

---

---

---

---

---

---

---

### Portable Printers

- ▶ HP OfficeJet 200
- ▶ HP OfficeJet 250 All-in-One (print, copy, scan)
- ▶ Canon Pixma iP110v
- ▶ Buy on line NOW and have shipped to home of staff in need



80

---

---

---

---

---

---

---


---

**Multifunction versus separate scanner & printer**  
For immediate home/remote use consider size of home office area



v.

**Less money versus longer life & better performance**



81

---

---

---

---

---

---

---

---

### Portable Postage & Label Printer

DYMO Label Printer & Digital Scale - \$218  
DYMO 450 Twin Turbo (no scale) - \$135



The image shows two DYMO products. On the left is the DYMO Label Printer & Digital Scale, a black device with a digital display and a printer. On the right is the DYMO 450 Twin Turbo, a smaller black printer with a roll of labels. A computer monitor in the background displays the DYMO software interface.

82

---

---

---

---

---

---

---

---

### Portable Optical Drive/DVD

- ▶ Smaller & lighter = no drive
- ▶ External USB DVD player/recorder external drive = \$30



The image shows a black external USB DVD player/recorder. It has a USB Type-C port and a USB 3.0 port. Icons for USB 3.0, Type-C, DVD, and CD are shown above the device. The Affinity logo is in the bottom right corner.

83

---

---

---

---

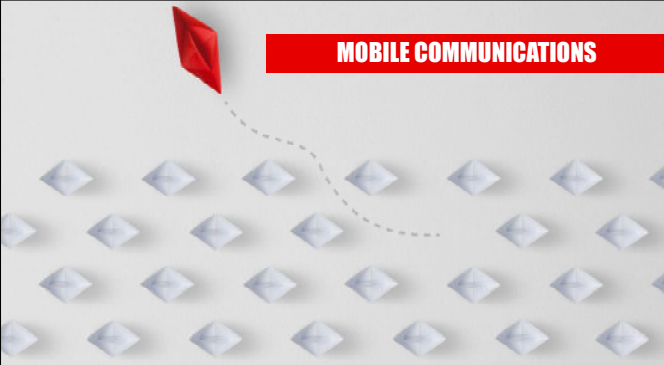
---

---

---

---

### MOBILE COMMUNICATIONS



The graphic features a red paper airplane flying over a grid of blue paper airplanes. A dashed line indicates the path of the red airplane. The text 'MOBILE COMMUNICATIONS' is written in white on a red background at the top.

84

---

---

---


---

---

---



---

---

▶ Cell phones aren't the best option 

▶ Hosted Voice Over Internet Protocol (VoIP) is a GREAT option

Laptop + Plantronics Savi Office W730

85

---

---

---

---

---

---

---

---

**You Must Have A Web Meeting Service**

▶ GoToMeeting 

▶ WebEx MeetMeNow 

▶ Adobe Connect 

▶ Microsoft Teams 

▶ Join.Me 

▶ Zoom 

<https://www.affinityconsulting.com/comparewebmeetings/>



86

---

---

---

---

---

---

---

---

**Better Webcams & Portable Video Conferencing**

▶ **Better Webcams** (super high demand right now so prices are high)

- ▶ Logitech C920 HD – list price \$80
- ▶ Logitech C930e – list price \$130
- ▶ Logitech Brio Ultra Pro – list price \$199

▶ Complete portable video conferencing system – Logitech Group Video Conference bundle – list \$1,300




87

---

---

---

---

---

---

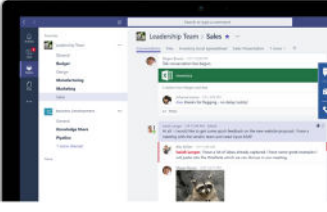
---

---

### Instant Messaging Can Be Very Important

Instant messaging with Microsoft Teams

Sign in Sign up for Free



Keep the team connected no matter where work takes you with Microsoft Teams

Affinity CONSULTING

88

---

---

---

---

---

---

---

---

### Professional Answering Service

To find options, web search the phrase **virtual receptionist**  
 (For some small firms simpler approaches may be preferable for COVID)



Affinity CONSULTING

89

---

---

---

---

---

---

---

---

### Virtual In/Out Boards

Want to save time, organize employees, and always be in the know?

- ▶ [www.simpleinout.com](http://www.simpleinout.com)
- ▶ [www.virtualinout.com](http://www.virtualinout.com)




Virtual In/Out provides your employees and visitors with a simple way to sign in and out of your building.

Affinity CONSULTING

90

---

---

---

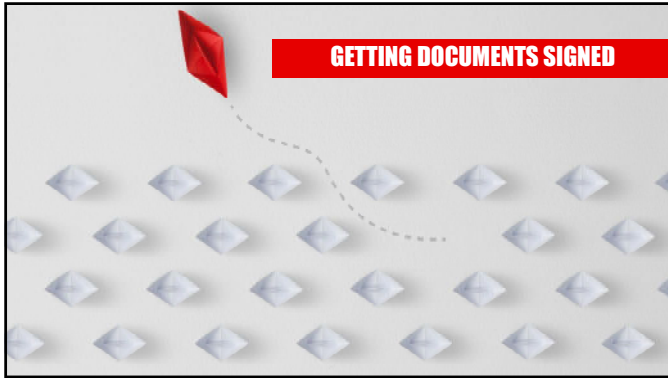
---

---

---

---

---



91

---

---

---

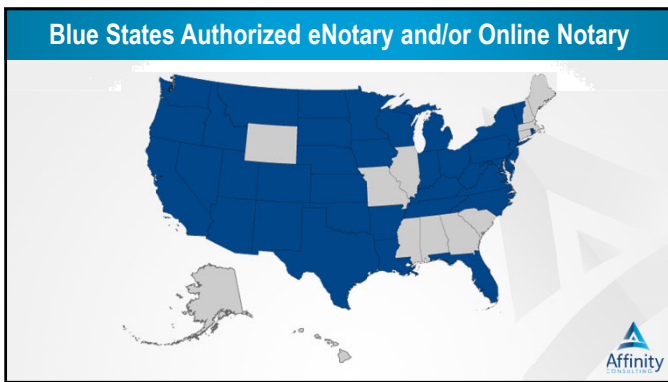
---

---

---

---

---



92

---

---

---

---

---

---

---

---

**Digital Signatures Are Legal But Not Generally For Wills**

- ▶ DocuSign: [www.docusign.com](http://www.docusign.com)
- ▶ RightSignature: (our favorite) [www.rightsignature.com](http://www.rightsignature.com)
- ▶ Even if you cannot use for wills consider for retainer agreements and other documents
- ▶ You can easily add this service NOW to your repertoire

The easiest, fastest way to get e-signatures.

93

---

---

---

---

---

---

---

---

**Digital Signatures**

- ▶ eSign: [www.adobe.com/esign](http://www.adobe.com/esign)
- ▶ OneSpan: [www.esignlive.com](http://www.esignlive.com)
- ▶ Hellosign: [www.hellosign.com](http://www.hellosign.com)

94

---

---

---

---

---

---

---

---

**SECURITY & PROTECTING CLIENT DATA**

95

---

---

---

---

---

---

---

---

**OK Rule 1.6(c) + Comments 16 & 17**

(c) A lawyer shall make **reasonable efforts** to prevent the **inadvertent or unauthorized disclosure of, or unauthorized access to**, information relating to the representation of a client.

[16] Paragraph (c) requires a lawyer to **act competently to safeguard information** relating to the representation of a client against unauthorized access by third parties and against inadvertent or unauthorized disclosure by the lawyer ...

[17] When **transmitting a communication** that includes information relating to the representation of a client, the lawyer must take **reasonable precautions** to prevent the information from coming into the hands of unintended recipients. ...

96

---

---

---

---

---

---

---

---

### Your Security Portfolio

- ▶ **Laptop, tablet & phone encryption**
  - ▶ Windows 10 Pro – Bitlocker
  - ▶ Mac – FileVault
- ▶ **Email encryption** – for example rmail.com 
- ▶ **Home router encryption** – WPA2 or WPA3 (not ok to use WEP) & change your default admin password
- ▶ **VPN service** – for example NordVPN 



97

---

---

---

---

---


---

---

---

### You Need A Password Manager

- ▶ Part of **your estate plan** – makes it sharable
- ▶ **Way too many** passwords and logons to keep track of
- ▶ They generate **strong passwords**
- ▶ **You're using the same password** for many logons
- ▶ Holds credit cards
- ▶ Holds any kind of personal info



98

---

---

---

---




---


---

---

---

### Options

- ▶ Dashlane 
- ▶ LastPass 
- ▶ Sticky Password
- ▶ LogMeOnce
- ▶ 1Password
- ▶ TrueKey
- ▶ RoboForm 
- ▶ Keeper Desktop



99

---

---

---

---

---

---

---

---

**Encrypted Flash Drives – If you are Saving to Your Home Laptop not the Cloud**

- ▶ Kingston DataTraveler 4000
- ▶ Aegis Secure Key
- ▶ CMS Secure Vault FIPS



100

---

---

---

---

---

---

---

---

**Encrypted External Drives**

- ▶ Lenovo ThinkPad USB 3.0 Secure Hard Drive
- ▶ Aegis Padlock
- ▶ iStorage 3 TB encrypted hard drive



101

---

---

---

---

---

---


---

---

**Enable Two Factor Authentication (2FA)**

Requires **2 authentication factors** to verify identity

- ▶ **Knowledge** factors – something you know
- ▶ **Possession** factors – ID card, security token or smartphone
- ▶ **Inherence** factors - biometrics



102

---

---

---

---

---


---

---

---

### Required Policies

- ▶ Internet use
- ▶ Social media
- ▶ Document retention
- ▶ Secure password – 12 characters, mixed case, at least 1 number & 1 symbol
- ▶ Disaster recovery plan
- ▶ Mobile security



---

---

---

---

---

---


---

---

103

### If Using Home Devices

- ▶ Make sure antivirus up to date
- ▶ Operating system updates have been installed
- ▶ Other family members should not have access
- ▶ Make sure WiFi is secure



---

---

---

---

---

---

---

---

104

### Mobile Backup For Your Laptop

- ▶ Carbonite 
- ▶ iBackup 
- ▶ CrashPlan 
- ▶ SOS Online Backup 
- ▶ iDrive 
- ▶ BackBlaze 



---

---

---

---

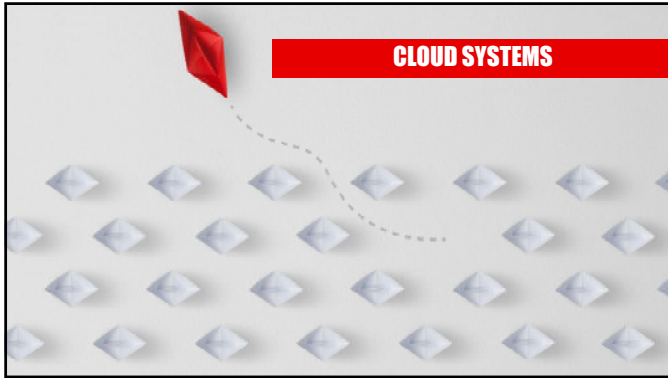
---

---

---

---

105



106

---

---

---

---

---

---

---

---

**If You've Resisted, It's Time To Embrace The Cloud**

**Software as a Service (SaaS)**

CosmoLex  
netdocuments

**Infrastructure as a Service (IaaS)  
aka "hosted servers"**

PROCIRRUS  
cloud technologies

Affinity

107

---

---

---

---

---

---

---

---

**Cloud Examples**

- ▶ Email
- ▶ Dropbox/Box/OneDrive/Google Drive
- ▶ ShareFile
- ▶ QuickBooks Online or Xero
- ▶ Web-based case management
- ▶ Web-based accounting
- ▶ Office 365 or G Suite
- ▶ Carbonite or Mozy online backup
- ▶ Hosted servers
- ▶ Electronic case filing

Affinity

108

---

---

---

---

---

---

---

---

**Consider Cloud Case Management & Accounting**

actionstep  
Clario  
PRACTICEPANTHER  
CENTERBASE  
CosmoLex  
mycase  
rocket matter  
zolaSUITE  
Affinity

109

---

---

---

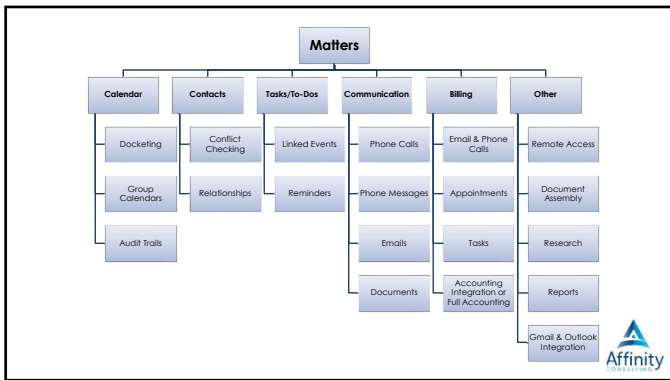
---

---

---

---

---



110

---

---

---

---

---

---

---

---

**Protect Your Firm – Do This NOW!**

If a **lawyer leaves**, can you...

- ▶ Produce his/her case list?
- ▶ Re-create a case history?
- ▶ Find all email related to a case?
- ▶ Find all documents related to a case?
- ▶ Determine status of a case?
- ▶ Consider what pay cuts, disruption of COVID, loss of clients, etc. may do to staff

If not, you have a problem

Affinity

111

---

---

---

---

---

---

---


---

### Protect Your Firm

**If something happens to you, can others...**

- ▶ Produce your case list?
- ▶ Re-create a case history?
- ▶ Find all email related to a case?
- ▶ Find all documents related to a case?
- ▶ Determine status of a case?
- ▶ COVID makes these hypotheticals REAL

**If not, you have a problem**



112

---

---

---

---

---

---

---

---

### Cloud Accounting Only Options

- ▶ QuickBooks Online
- ▶ Xero
- ▶ Bill4Time
- ▶ Legal Billing
- ▶ Toggl
- ▶ FreshBooks
- ▶ Timesolv Legal
- ▶ Case management options

Intuit QuickBooks Online



BILL4TIME  
Web-Based Time Billing Software

Legal Billing from Chaos Software





TimeSolv Legal



113

---

---

---

---

---


---

---

---

### If You Have Office 365, Then Use More Of It

Outlook Manage your email and calendar	Calendar Manage your calendar and appointments	OneDrive Store and sync your files and folders	SharePoint Collaborate and share information	Word Create and edit documents
Excel Analyze and visualize data	PowerPoint Present your ideas and information	Teams Collaborate and chat in real-time	Access Build and share data-driven apps	Project Manage your projects and tasks
Forms Collect and analyze data	Power Automate Automate your business processes	OneNote Take and share notes	Stream Watch and share videos	Planner Organize your work and tasks
Mail Send and receive email	OneShare Share and collaborate on files	OneShare Share and collaborate on files	OneShare Share and collaborate on files	OneShare Share and collaborate on files



114

---

---

---

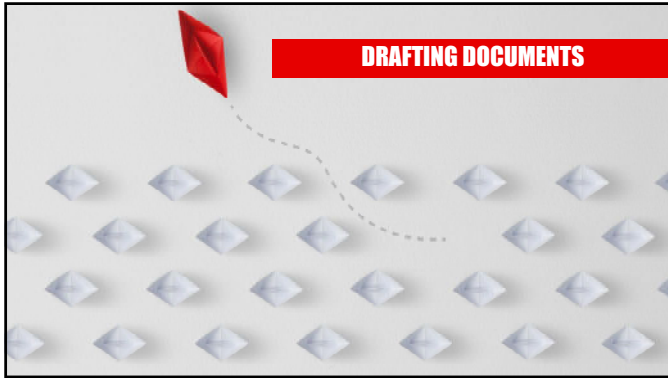
---

---

---

---

---



115

---

---

---

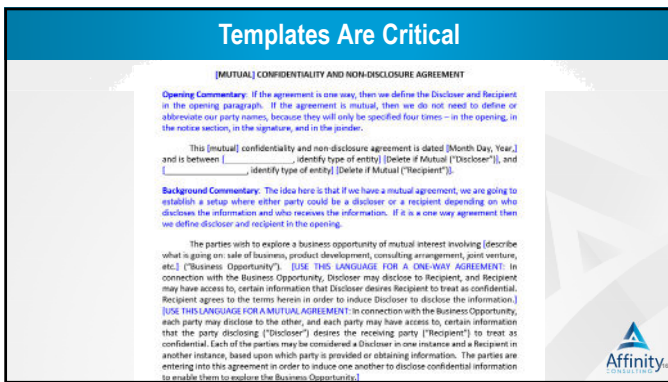
---

---

---

---

---



116

---

---

---

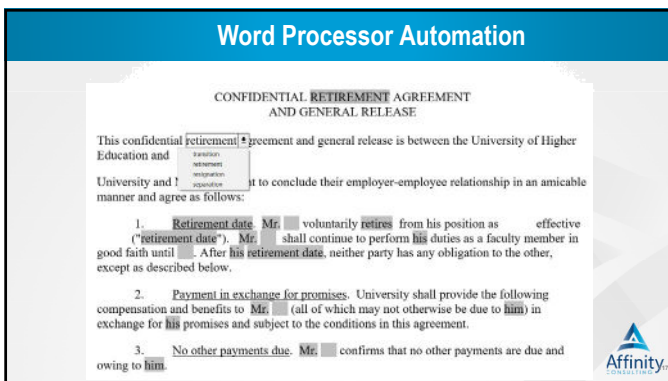
---

---

---

---

---



117

---

---

---

---

---


---

---

---

### Document Assembly Software Could Save The Day

- ▶ Works with Microsoft Word
- ▶ You use **your** documents
- ▶ Answer questions
- ▶ Software does the heavy lifting



118

---

---

---

---

---

---

---

---

### Document Assembly Software Options

Players:

- ▶ HotDocs - [www.hotdocs.com](http://www.hotdocs.com)
- ▶ Contract Express - [www.contractexpress.com](http://www.contractexpress.com)
- ▶ XpressDox – [www.xpressdox.com](http://www.xpressdox.com)
- ▶ TheFormTool – [www.theformtool.com](http://www.theformtool.com)
- ▶ Rapidocs - [www.rapidocs.com](http://www.rapidocs.com)
- ▶ Pathagoras - [www.pathagoras.com](http://www.pathagoras.com)
- ▶ ActiveDocs - [www.activedocs.com](http://www.activedocs.com)
- ▶ Smokeball – [www.smokeball.com](http://www.smokeball.com)







119

---

---

---

---

---

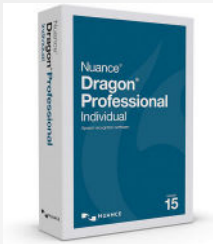
---

---


---


### Amazing Speech Recognition

**Dragon Professional Individual v15**



**Andrea 351924 Speech Recognition Mic**





120

---

---

---

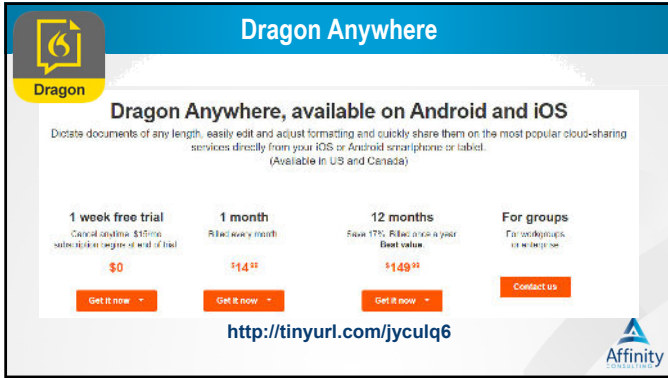
---

---

---

---

---



**Dragon Anywhere**

Dragon Anywhere, available on Android and iOS

Dictate documents of any length, easily edit and adjust formatting and quickly share them on the most popular cloud-sharing services directly from your iOS or Android smartphone or tablet. (Available in US and Canada)

<b>1 week free trial</b> <small>Cancel anytime. \$15/mo subscription begins at end of trial.</small> <b>\$0</b> <a href="#">Get it now</a>	<b>1 month</b> <small>Rates every month.</small> <b>\$14.99</b> <a href="#">Get it now</a>	<b>12 months</b> <small>Save 17%. Rates once a year. Best value.</small> <b>\$149.99</b> <a href="#">Get it now</a>	<b>For groups</b> <small>For workgroups or enterprise.</small> <a href="#">Contact us</a>
---	---	--	---

<http://tinyurl.com/jyculq6>

Affinity

121

---

---

---

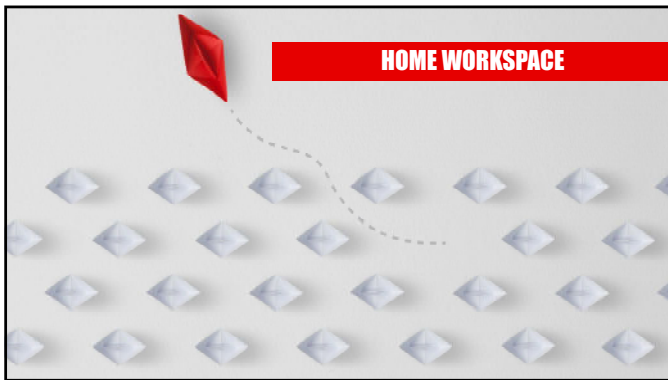
---

---

---

---

---



**HOME WORKSPACE**

A red paper airplane icon is shown flying over a grid of white paper airplane icons on a light gray background.

122

---

---

---

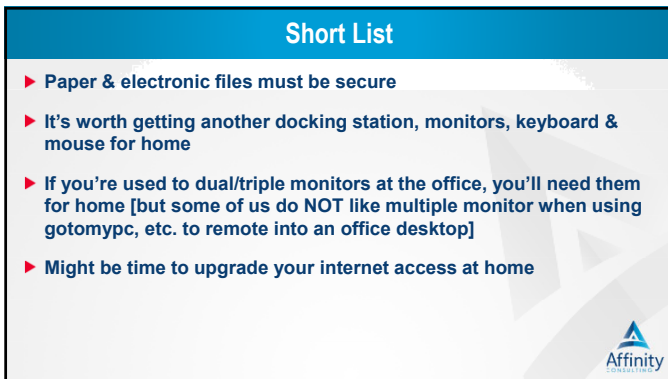
---

---

---

---

---



**Short List**

- ▶ Paper & electronic files must be secure
- ▶ It's worth getting another docking station, monitors, keyboard & mouse for home
- ▶ If you're used to dual/triple monitors at the office, you'll need them for home [but some of us do NOT like multiple monitor when using gotomypc, etc. to remote into an office desktop]
- ▶ Might be time to upgrade your internet access at home

Affinity

123

---

---

---

---

---

---

---

---

**Conclusion and  
Additional Information**

**Improve your Remote  
Work Capabilities Now**

---

124

124

---

---

---

---

---

---

---

---

**Conclusion**

- Every practitioner can take steps to enhance remote work capabilities in the current COVID environment.
- Find out what works for your and your firm, what can be done now while you are facing challenges, what can be done when your office/firm gets limited ability to reopen, and what should be done long term.

125

125

---

---

---

---

---

---




---

---

**Additional information**

- Barron K. Henley, Esq., Partner, Affinity Consulting Group [bhenley@affinityconsulting.com](mailto:bhenley@affinityconsulting.com)
- Mary E. Vandenack, Esq. [mvandenack@vwattys.com](mailto:mvandenack@vwattys.com)
- Jonathan G. Blattmachr [jblattmachr@hotmail.com](mailto:jblattmachr@hotmail.com)
- Martin M. Shenkman [shenkman@shenkmanlaw.com](mailto:shenkman@shenkmanlaw.com)
- Interactive Legal [sales@interactivelegal.com](mailto:sales@interactivelegal.com)
- Peak Trust Company [bcintula@peaktrust.com](mailto:bcintula@peaktrust.com)

126

126

---

---

---

---

---

---

---

---

## CLE Credits

- For more information about earning CLE credit for this program or other Martin Shenkman programs please contact Simcha Dornbush at NACLE. 212-776-4943 Ext. 110 or email [sdornbush@nacle.com](mailto:sdornbush@nacle.com)

127

127

---

---

---

---

---

---

---

---